Pension transfer reminder email

**Sample email copy for employers – transfer reminder email**

To help you communicate your new Aegon workplace pension to your employees, we’ve produced this sample copy for you to use. If you adapt or remove elements of this text we cannot be held responsible for any consequences arising from doing so.

We’ve taken all reasonable care to make sure the information is accurate at the time of issue, but we don’t accept liability for any consequences resulting from its use.

There are certain rules you must follow when promoting your company pension scheme to your employees. You can find out more about these on [The Pension Regulator’s website](https://www.thepensionsregulator.gov.uk/en/employers/managing-a-scheme/communicating-with-your-scheme-members).

If you’re not sure if it’s suitable for your purposes, please get in touch with your financial adviser.

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**Have you received your pension transfer pack?**

Hello <Name>,

You may have received a pension transfer pack from our new workplace pension provider, Aegon. It contains information on how you can combine your pension pot already built up in the <previous pension scheme name> scheme, with your new Aegon workplace pension – should you wish to.

Just as a reminder, you have three options for what you can do with the pension pot you’ve built up in the <previous pension scheme>.

Option 1: Leave it with the current provider.

Option 2: Transfer it to another pension provider.

Option 3: Transfer it to Aegon and combine it with your new workplace pension.

If you’re looking to transfer - you should be comfortable with the investment decisions you make as you may lose valuable features, protections, guarantees or other benefits when you transfer.

A transfer of your pension pot already built up in the <previous pension scheme name> for consolidation purposes is from one capital at risk pension product to another - so the value of your investments after any consolidation can still fall as well as rise and the final value of your consolidated pension pot may be less than paid in.

Any new funds you move your money into will have their own set of risks that will be detailed in the fund information that is available to you.

If you would like to transfer your existing pension pot with your new Aegon workplace pension, complete and return the transfer pack to Aegon.

As your employer, we aren’t authorised or regulated to give you advice or recommendations on what you should do. For general information about pension transfers you can visit [Money Helper](https://www.moneyhelper.org.uk/) or, as an Aegon customer, Aegon Assist is on hand to help.

They’re a free, friendly, UK-based team of trained specialists who can give you general guidance in plain English to help you make your own decisions.

**Call Aegon Assist on 0345 603 0509. Call charges will vary.**

As Aegon Assist don’t provide advice and if you’re not sure if transferring is right for your circumstances you should speak to a financial adviser - there may be a charge for this.

<sign off>